Using the eGov Agenda Builder

This guide will help you utilize the Agenda Builder application within the eGov Manager. The Agenda Builder enables you to create an interactive agenda for your meeting with links to documents so that you can make your meetings paperless. Streaming Media enables you to create an interactive tool for constituents that will allow them navigate directly to a specific point in the audio or video that corresponds with your meeting's agenda. Note that you can use Streaming Media for both audio and video files. This guide will cover the following:

- Adding an agenda, modifying an agenda, proposing new items to an agenda, and viewing the agenda on the public side of the website; and

- Connecting an agenda to streaming media and creating meeting minutes that are bookmarked to the appropriate section within the meeting agenda.

Basic Agenda Builder

This application allows Department Staff (Administrators, Content Providers, and Webmasters) to manage all facets of meetings

Users have the ability to create paperless agendas, set up a meeting calendar, list board members, and quickly disseminate related documents and files

Agenda Builder & Streaming Media

Departments, Boards, Committees, and Commissions can quickly prepare meeting agendas, complete with attached reports, maps, videos, drawings, and other supporting documentation accessible from individually linked agenda items

Agendas can be linked to streaming video and meeting minutes, allowing visitors to jump to specific areas of the recorded meeting without having to guess where an agenda item or topic begins

Please Note: *This guide is generic.* It is meant to show the overall functionality of the Agenda Builder Application and is not specific to any client. Should you have questions about using the Agenda Builder, please contact the eGov Strategies Support Team by emailing support@egovstrategies.com.

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Public Side – Finding Meeting Agendas & Minutes

Viewing Agendas on the Public Side

1. To view your Agenda on the public side, visit your website's **Document Center**. In most cases, you will have a *Document Type* for either Agendas, Minutes or both (e.g., Agendas & Minutes). Use the Document Type drop-down to filter by the appropriate Document Type.

2. The Document Center will display the documents based on the "Official Date" of the document.

3. Locate your agenda in the list, and **click the title** to view.

4. The Agenda will be displayed in your browser tab. A sample agenda created with the Agenda Builder is shown on the next page:

CITY OF WESTFIELD, IN

City Council Meeting - 10/04/2013

Friday, October 04, 2013 at 07:00 PM

BOARD OR COMMISSION: Westfield City Council

MEETING DATE: Friday, October 04, 2013 at 07:00 PM

MEETING PLACE: City Hall

THE FOLLOWING AGENDA IS SUBJECT TO CHANGE AT THE DISCRETION OF THE WESTFIELD CITY COUNCIL

OPENING OF MEETING

1. Pledge of Allegiance
2. Invocation
3. Announce any changes to Agenda
4. Approval of Minutes

PUBLIC COMMENT

1. **Guests:** *Residents who wish to address the Council may do so at this time.*
2. Council Response to Guest Comments
3. Claims

MISCELLANEOUS BUSINESS

4. Old Business
5. New Business

COMMENTS

1. City Council Comments
2. Mayor Comments

ADJOURN

EXECUTIVE SESSION

Viewing Meeting Minutes Integrated with Streaming Media

To access meeting minutes that have been bookmarked with streaming media (e.g. either an Audio or Video file), select the "Watch Meeting" link at the top of the Agenda.

1. To watch your newly created meeting with streaming media, go to your *public* page and search for your Agenda within **Document Center**.

2. Click on the Agenda Title to see your agenda in the normal display. Click the **Watch Meeting** button at the top of the screen to view your meeting and minutes.

3. You will now see three content windows – *Video, Meeting Agenda*, and (below) *Meeting Minutes*.

4. The agenda items within **Meeting Agenda** and **Meeting Minutes** correspond, so select from either menu to jump to that specific point within the Meeting to view both the audio/video stream and the minutes for that specific agenda item.

## eGov Manager – Locating the Agenda Builder

Agenda Builder Options

Once you are logged into the eGov Manager, locate the Agenda Builder by finding the "Content" on the left navigation bar. If you select "Content", the list will expand. Click "Agenda Builder" and the list will expand once again and provide the options detailed to the right.

Administrators and Content Providers will have access to the following options:

- **Propose Item**: Propose an item to be added to the next meeting agenda. The proposed items need to be approved before they are added to the next meeting agenda.

- **Add**: Create a new Agenda for your website.

- **Modify**: Edit or delete existing Agendas.

The following options are usable by Webmasters:

- **Templates**: These will be pre-configured by eGov.
  Webmaster will have the ability to copy, revise, and customize Agenda templates.

- **Configure**: This is an advanced feature for associating additional classification types for the Agenda Builder.
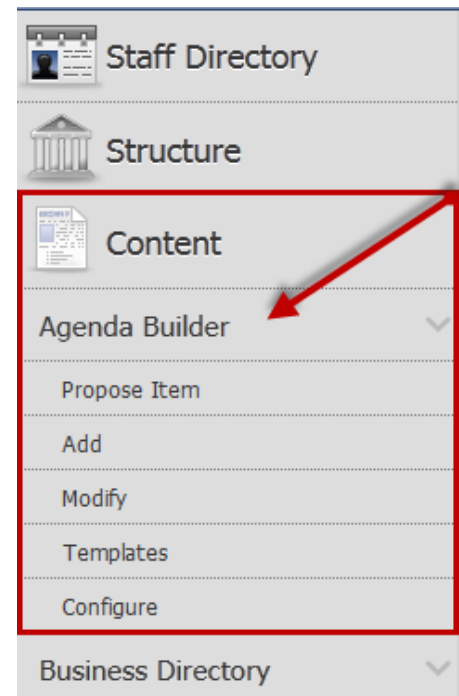
Templates Used within the Agenda Builder

The templates option within the Agenda Builder application enables authorized users to control and customize the following components of your Agenda & Meeting Minutes:

- **Master Agenda Template** – enables you to set default values that will be used within the Agenda builder. The Master Agenda does not control any styling of your Agenda but is used to configure default values like the Title of the Agenda, Location, Classification and the default list of items that should always appear when you create a new agenda with this Master Agenda type.

  Key components that can be managed for a Master Agenda template include the following:

  o <u>GENERAL TAB</u> – set the associated **HTML template** that will be used to control the look-and-feel of this template (see below), default meeting title, default meeting start & end times, default location, and default classifications (keywords, department & division associations, category & topic associations);

  o <u>ACCCESS TAB</u> – set activation or expiration dates & times;

  o <u>NUMBERING</u> – style (indentation, number/letter associations) used within the agenda/minutes document; and

- o <u>ITEMS</u> – default list of items that will appear in your agenda / meeting minutes.

  *Note that when you change a Master Template item, **IT WILL NOT UPDATE** any agendas created with this template but those changes will be associated to future agendas created with this Master Agenda template.*

- **HTML Template** – defines the look-and-feel for the agenda/minutes. Elements of the HTML Template include the following:

  - o Title of the HTML Template and Status (active or inactive);

  - o Authorized Departments/Divisions that can use this HTML Template;

  - o Page Template – the overall page "wrapper" to be used when generating this Agenda/Minutes on your public website;

  - o Syntax – generally HTML; and

  - o Template – eGov "pseudo-code" that formats various components configured within the Master Template (e.g. the Title, Board/Commission, Items, etc.) and loops through the various created Agenda Items to display the Agenda Items within the Meeting Agenda page.

  *Note that when you change an HTML Template, **the changes will automatically be reflected** in any Agendas created with a Master Template that is using this specific HTML Template.*

- **Streaming Template** – defines the look-and-feel for the streaming minutes page. Elements of the Streaming Template include the following:

  - o Title of the Streaming Template and Status (active or inactive);

  - o Authorized Departments/Divisions that can use this Streaming Template;

  - o Syntax – generally HTML; and

  - o Template – eGov "pseudo-code" that formats various components configured within the Master Template (e.g. the Title, Board/Commission, Items, etc.) and loops through the various created Agenda Items to display the Agenda Items within the Streaming Minutes page.

  *Note that when you change a Streaming Template, **the changes will automatically be reflected** in any Agendas created with a Master Template that is using this specific Streaming Template.*

Modifying Templates

Note that generally templates are configured on your behalf by the eGov Support Team. If you decide to modify a template, please follow be sure that you have a backup of the working template so that you can restore it in the event that you make an error.
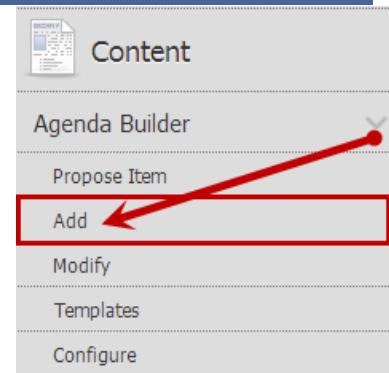
Generally, we recommend copying the pseudo-code into a text editor like Notepad.

Using the Agenda Builder

Adding an Agenda

1. To add an agenda, click **Add** under **Agenda Builder** on the left sidebar.

   You will then be prompted to **select an Agenda Template**. Make your selection from the drop-down menu and click **Continue**.

Please note: the templates will be pre-configured by eGov. Webmasters will have the ability to copy, revise, and customize these templates. If you have any questions about the available templates for Agendas, please see your Webmaster.
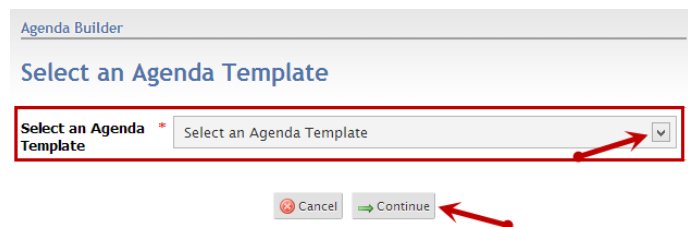
For the purposes of this guide, we will build a City Council Meeting Agenda.

2. By default, you are taken to the **General** tab. This is where you will begin entering information about your upcoming meeting. The screenshot below details the fields under **General**.

A. **Master Agenda**: This will automatically be filled in when you select the Agenda Type from the previous screen.

B. **Status**: In most cases, the Agenda will need to be Active. Setting it as inactive will hide it from the Agenda list and from public view.

C. **Featured**: Check "Yes" if you would like the Agenda to be visible in your website's search results.

D. **Meeting Title**: Insert the title of your meeting here.

E. **Board/Commission**: Insert the title of the Board or Commission Meeting here.

3. Once you have entered the above information, you are then asked for details about the **meeting date**, **time**, **location**, and **description**. Fill in each field appropriately.

For **Make Compressed File Available**: Selecting **Yes means that** the agenda, and all meeting documents, will be available via a link so you can package the HTML agenda files and all uploaded documents into a zip file, making file sharing easier.

Meeting Start	Aug 1, 2013 7:00 PM Clear
Meeting End	Aug 1, 2013 8:00 PM Clear
Location	City Hall
Make Compressed File Available	⦿ Yes ◯ No
Description	Regular monthly City Council Meeting to be held on August 1, 2013.

Next, you will confirm the Classification of the Agenda.

4. Add **keywords** as necessary. This is not required.

5. Next, select the correct **Department or Division**, **Category or Subcategory**, **List Topic or List Subtopic** association. In this case, we only need to select "**City Council**" from the **Department/Divisions** list, as this Agenda is specific to the City Council.

6. Click **Close List** to collapse the list when finished.

Classification

Keywords

Departments / Divisions * ⊖ Close List   ✔ Select All   Select Parent Items   ✖ Clear All

- ☐ City Assistant Manager
- ☑ City Council   Select Child Items   Clear All
  - ☐ Board of Public Works   ☐ New Council Division   ☐ Plan Commission
  - ☐ Council Map
- ☐ City Manager
- ☐ eGov Manager Demo Home
- ☐ Employees
- ☐ Finance   Select Child Items   Clear All

7. Once you have completed steps 6-7, select the **Document Type**. This list is dependent on the types configured by eGov or your Webmaster. In this case, we will select **Agendas**.

8. Click **Close List** to collapse the list when finished.

Document Types   * ⊖ Close List   ✔ Select All   Select Parent Items   ✖ Clear All

- ☑ Agendas
- ☐ Minutes
- ☐ News & Notices
- ☐ Policies & Procedures
- ☐ Related Pages

Instead of clicking Save & Continue right away, scroll back to the top of the page to view the other tabs.

Agenda Builder
Add Agenda

General   Access   Items   Social Media & Alerts

Under the **Access** tab, you will find additional publishing options for your Agenda.

A. **Activation Date**: Select a specific date for the Agenda to be activated, if it will not be published immediately.

B. **Expiration Date**: Select a specific date for the Agenda to expire on the public side of your website.

C. **Public Access**: Select one of these options to allow the Agenda to be visible to **Anyone** (citizens and staff), **Registered Users** (for citizens who are registered users of your website), or **Intranet Only** (to be visible by staff or internal users only).

D. **Intranet Access**: Select Not an Intranet Item for the document to be visible to the Public, or select All Staff (everyone internally), Department Staff (those with access to specific Department), or Divisions Staff (those with access to specific Divisions).

E. **Resultant Access**: As stated, this item is viewable to any website visitor.

*Please note: Activation Date and Expiration Date **can be left blank** and are **not** required fields.*

Under the **Items** tab, you will find all items available for the Agenda you are building.

From here, you can do the following:

a. **Add a New Item –** create a new item.

b. **Add a Proposed Item –** add an item that has been proposed by an internal user.

c. **Order items** - to organize your Agenda.

You can also **edit** or **delete** the items that are present.

a. **Edit** an item by **clicking the Pencil icon** to the left.

b. **Delete** the item by **clicking the Delete button** (also to the left).

9. To add a new item to the Agenda, click **Add Item**. The screen will change, giving you new options.

10. Select the item's **Position**, **Number Style**, **Number Restart**.

11. Next, **describe the item**. Keep this as brief as possible.

12. You will also be able to **upload**, **create**, **link**, or **associate a document** to this item if necessary.

    a. Clicking **Upload** will prompt you to browse your computer for a file.

    b. Clicking **Create** will prompt you to create a document, much like what you do within the Document Center.

    c. Clicking **Link** will prompt you to add a custom URL.

    d. Clicking **Associate** will allow you to link to a document, or other item, that has been added to the website previously.

13. Once you have made your selection(s), click Continue & Add Another to add another document. Otherwise, click Continue to keep creating your Agenda.

To add a proposed item to the Agenda, click **Add Proposed Item**. If there are Proposed Items in the list, they will appear in the pop-up.

14. You can choose to **Approve** or **Deny** a Proposed Item from this screen. Once you have made your selection and approved an item to add to your current agenda, click **Continue**.

In this case, the Proposed Item has been approved. It is now visible in the list after you click Continue.

Agenda Items 1-19 of 19

Edit	Delete	ID	Stream	Number	Item	Documents
📝	⊖	97155401	n/a		THE FOLLOWING AGENDA IS SUBJECT TO CHANGE AT THE DISCRETION OF THE COUNCIL	
📝	⊖	61053486	n/a		AGENDA	
📝	⊖	82905588	n/a		Pledge of Allegiance	
📝	⊖	51720084	n/a		Invocation	
📝	⊖	27669741	n/a		Opening of Meeting:	
📝	⊖	8388231	n/a		Note the presence of a quorum	
📝	⊖	32526194	n/a		Announce any changes to Agenda	
📝	⊖	95055857	n/a		Approval of Minutes:	
📝	⊖	2484973	n/a		Guests:Residents who wish to address the Council on items not on the agenda may do so at this time.	
📝	⊖	53927883	n/a		Council Response to Guest Comments	
📝	⊖	56469833	n/a		Claims:	
📝	⊖	43520534	n/a		Miscellaneous Business/Special Recognition:	
📝	⊖	6203921	n/a		Old Business:	
📝	⊖	57517590	n/a		New Business:	
📝	⊖	38908444	n/a		City Council Comments	
📝	⊖	98975666	n/a		Mayor Comments	
📝	⊖	54392565	n/a		Adjourn	
📝	⊖	89376819	n/a		Executive Session: I.C. 5-14-1.5-6.1 (b) (2) (B): Legal Issues	
📝	⊖	proposed2	n/a		Pledge of Allegiance in Portugese	

The final tab, **Social Media & Alerts**, is where you can conduct one-click publishing to your eNotify lists or Social Media accounts.

15. Select the appropriate list, if necessary. If you do not want to quick-publish, leave the boxes blank.

16. Click Save & Continue once you have made your selection.


Congratulations! You have now successfully created an Agenda with the Agenda Builder. Keep reading to learn how to **Modify an Agenda**.

Modifying an Agenda

1. To modify an existing Agenda, click **Modify** under **Agenda Builder** on the left sidebar.

2. Click **Edit** to modify an existing Agenda.

   a. Click **Delete** to delete an agenda.

   b. Click **Copy** to copy an existing agenda. *Please note that when you copy an agenda, it will automatically make it Inactive, so be sure to switch it to Active (under the General tab).*
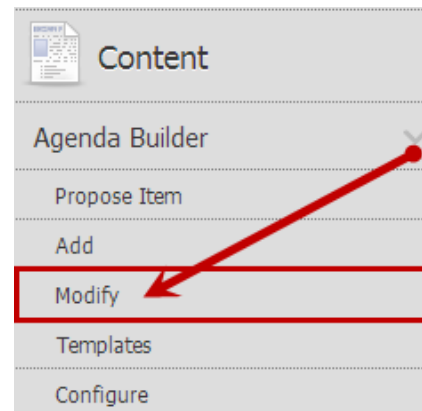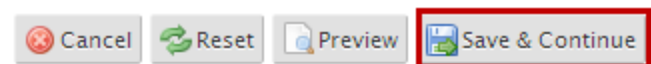
3. Once you click **Edit**, you will be taken by default to the **General** tab of the Agenda. Here, you can make your changes as necessary.
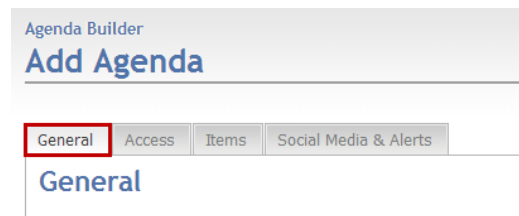
   a. Use the steps on the previous pages to walk you through each component if you have questions.

4. When you are finished making your changes, simply click **Save & Continue**. Your changes will be saved, and you will be taken back to the Agenda listing.

Agenda Builder
Manage Agendas

✓ Successfully Modified Agenda and Published Changes

Search

Item

☐ Show Inactive ☐ Featured Only

🔄 Clear   🔍 Search

**Agendas 1-15 of 23**   Next »

| Edit	Delete	Copy	Stream	Status	F	ID	Title	Meeting Date ▲	Created On	By	Modified On	By
✏ Edit	⊘ Delete	📋 Copy	🔴	Active	No	245	City Council Meeting - August 1, 2013.	8/1/13 19:00	06/26/13	DU	06/26/13 22:16	DU
✏ Edit	⊘ Delete	📋 Copy	🔴	Active	No	240	New City Council Meeting - mm/dd/yy	7/31/13 19:00	06/25/13	DU	06/25/13 12:43	DU

Proposing an Agenda Item

This section will cover how to **Propose an Agenda Item**, as well as how to **Approve** or **Deny** a proposed agenda item.

1. To begin, select **Propose Item** under **Agenda Builder** on the left sidebar.

   From here, you can view proposed items awaiting approval, search by specific agenda, or add a new proposed item.
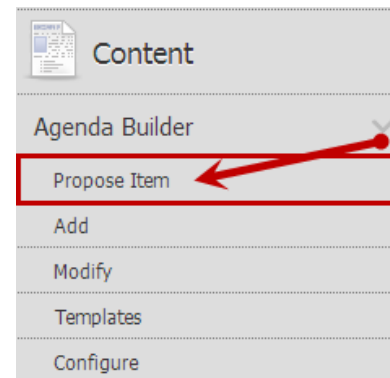
2. If there are proposed items waiting for approval, they will be listed. If not, you can begin adding items by clicking **Add Proposed Item**.

3. Select the appropriate Agenda from the drop-down menu.
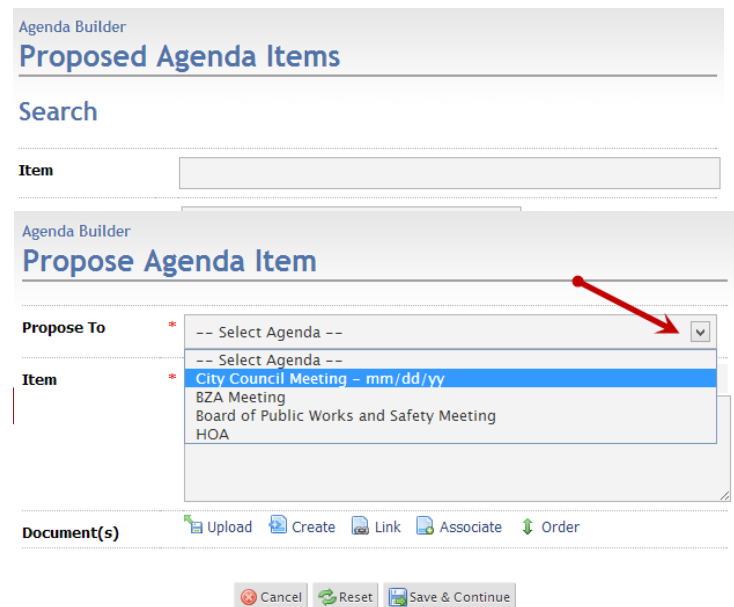
4. Once you have made your selection, add a **description** in the **Item** box.

5. Next, if you would like to add an associated document, you can do so by clicking **Upload**, **Create**, **Link**, or **Associate**. Click **Order** to reorder (if you have added multiple documents).
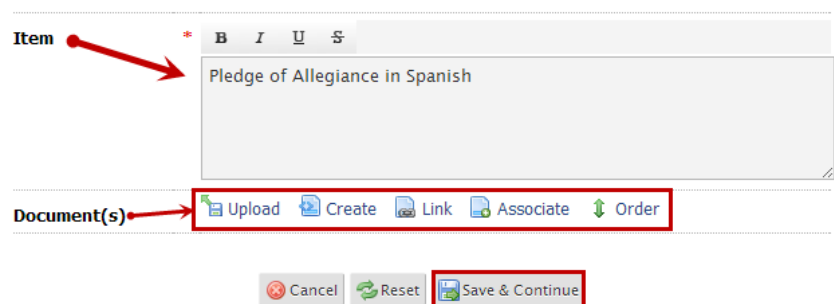
6. Click **Save & Continue** to finish proposing the item. It will then be visible in the **Proposed Agenda Items** list.

Using Streaming Media to Create Public Meeting Minutes

Preparing Your Streaming Media

In order to be able to associate a streaming media file to your Agenda to create Meeting Minutes, you will need to do the following:

- Save or convert your media to Windows Media File (.wma or .wmv); and
- FTP your file to the Streaming Media server configured for your eGov Manager instance.

Transitioning Agenda Templates to Create Meeting Minutes

1. To transition an agenda to serve as meeting minutes that are mapped to either an audio or video file, select *Modify* under the **Agenda Builder** drop-down menu.

2. Next, click the colorful streaming icon to the left of the Agenda Title you wish to change.

Edit	Delete	Copy	Stream	Status	F	ID	Title
Edit	Delete	Copy	●	Active	No	240	New City Council Meeting - mm/dd/yy
Edit	Delete	Copy	●	Active	No	220	eGov Manager Training (BZA template)
Edit	Delete	Copy	●	Active	No	212	New BZA Meeting

3. At the top of the screen, select the option to **Add Stream**.

4. A window will pop up that displays all the audio and video files available within the directory to select a stream from. *Use FTP to transfer files into this directory.* **Double-click** on the file to begin splicing the stream.

5. You should now see your stream playing on the left. Pause the stream at the beginning, and choose *Streaming Template* from the drop-down menu.

Creating Meeting Minutes

1. Start the stream and allow it to play until the end of the first agenda item (e.g. Opening of Meeting, Pledge of Allegiance, etc.). Then hit the pause button.

2. Next, click the **Bookmark** icon under the column **S/E (Set/Edit)**. This will capture that portion of the stream and associate it to your first agenda item. *The time listed is the start time of that agenda item and also the end time of the preceding item.*

3. When you click on the Bookmark icon, you will see an area to add content below the streaming window. This window utilizes the same HTML Editor you see throughout the eGov Manager. Use this area to add notes, tables, pictures, links to eGov content, and more.

4. When you are finished, select **Save Notes** at the top of the window to associate the content with a particular agenda item.

5. Repeat **Steps 1 – 4** to associate bookmarks and notes to your desired agenda items. When you are done, select **Save and Continue** at the very bottom of the screen to successfully transition your agenda into a Streaming Template with meeting minutes.

Conclusion

Congratulations, you now know how to Create, Modify, and View your Agenda on your eGov Website, as well as use streaming media to create interactive, public meeting minutes.

Should you have any questions about the Agenda Builder or the use of Streaming Media, please contact the eGov Strategies Support Team by emailing support@egovstrategies.com.